



Strategic
Marketing &
Research, Inc.

Indiana Division of Tourism Ad Effectiveness Research Report

2005 Spring Campaign

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BACKGROUND & OBJECTIVES

The Indiana Office of Tourism Development is committed to evaluating its advertising and marketing efforts, as this process provides both a “report card” relative to the impact of the marketing efforts and tactical information which can be used to enhance effectiveness. The specific methodology used in this research is designed to determine if advertising awareness is linked to increased travel to the State. This methodology, developed by Strategic Marketing & Research, Inc., has been used by numerous destinations across the country. It is based on the recognition that the influence of advertising on destination selection usually includes several steps.

People see advertising, identify with the marketing message, become interested in the destination, and eventually visit. As such, to adequately measure the impact of an advertising campaign, the research measures impact at various steps in the consumer’s decision-making process. While the campaign may not generate immediate travel, if it has positive impact on consumers’ image of the State, it is effective in one area of influence.

This study addresses the following informational objectives:

- **Determine the level of advertising recall** generated by Indiana’s advertising campaign among target audiences;
- **Compare Indiana’s share of voice** to that of its key competitors;
- **Compare consumers’ reactions** to Indiana’s ads and those of competitors;
- **Gauge the effectiveness of advertising** within target markets and compare the relative value of the options under consideration;
- **Evaluate the campaign’s influence** on consumers’ attitudes and the generation of additional travel to the State;
- **Compare results among targeted geographic regions** which were the focus of the campaign;
- **Determine visitors’ activities and expenditures** during their stays in Indiana;
- **Calculate the economic benefit** of the marketing campaign; and
- **Provide specific conclusions and recommendations** relative to the effectiveness of marketing Indiana as a tourism destination.

METHODOLOGY

The methodology used in this research used an on-line survey to measure consumers' attitudes and behavior among a representative sample of those who were targeted with the advertising. This allows a measure of the total influence on the target audience and focuses on the level of additional travel which can be attributed to the advertising.

The on-line survey was conducted in November 2005. In total, 1002 surveys were completed from a qualified list of potential participants. To qualify for participation, respondents had to take at least one, overnight, leisure trip per year. Within the total sample, quotas were set by geographic region with the following results: Chicago - 147, Cincinnati - 190, Dayton - 190, Champaign - 94, Peoria - 118, Indianapolis - 132 and Indiana - 131. The resultant data were weighted to represent the population in each target area.

The questionnaire included a review of Indiana and key competitors' (Illinois, Kentucky, Michigan, and Ohio) print, radio and TV ads, evaluation of the Indiana ads, travel to Indiana and other states, and the specifics of respondents' trips. Upon conclusion of the data collection process, the data were cleaned and coded for analysis.

The analysis involved comparing attitudes and imagery of the State between aware and non-aware respondents to accurately measure advertising exposure (which can be used to evaluate various media purchases and the overall campaign). Moreover, the advertising creative and the manner in which the advertising influenced the State's imagery and consumers' interest in visitation were evaluated. The following report summarizes the findings and forwards conclusions and recommendations for consideration.

CAMPAIGN OVERVIEW

Before reviewing the research findings, we review the tested elements of the Indiana campaign and the other advertising, including the competitive ads which were included in the analysis.

TV Ads:

Indiana - Nine 15-second ads which featured specific unique attractions throughout the State. The ads focused on Blue Springs Cavern, the Indiana Dunes, Monument Circle, the Paramount Theater, Turkey Run, West Baden, Holiday World, Madison/Scenic Byways and Notre Dame. The ads ran in pairs to create 30-second spots.

Ohio - Three 30-second ads showing the Ohio experience and the theme, “So much to discover.”

Michigan - Two 30-second ads which focused on getting people to the Michigan Website.

Illinois - Two 30-second ads which featured “magnificent miles” in Illinois. The ads used black and white photography.

Kentucky - One 30-second ad featuring the new Kentucky theme – Unbridled Excitement.

Radio Ads:

Indiana - Seven 15-second ads which mirrored the TV advertising and included an ad for Indiana Beach and the White River in lieu of Monument Circle. Each ad focused on the uniqueness of the attractions.

Ohio - Two 30-second ads featuring the Vintage Grand Prix and Air Force Museum with the theme, “Ohio, the experience stays with you”.

Print Ads:

Indiana - Two co-op ads with a montage of individual ads from the co-op partners.

Ohio - Two full-page, print ads, using a screened background and then views of various attractions and two advertising inserts which included a brochure on Ohio.

Kentucky- Five print ads

Marketing Budget

The 2005 marketing budget decreased 16% compared to 2004, with a total of \$678,000 this year compared to \$810,000 in 2004. For the 2005 campaign, the largest expenditure was for television, followed by print, with the smallest investment in radio.

Media Type	Investment
Television	\$351,020
Radio	\$106,781
Co-op Print	\$220,172
Total Campaign Costs	\$677,973

The TV and radio costs can be allocated by geographic market. About one-half of the money was spent in-state -- split between Indianapolis and the rest of the State. Ohio markets represented about one-third of the spending, with the rest invested in Illinois.

Media Costs

Markets	TV	Radio	Total	%
Cincinnati	\$65,395	\$28,070	\$93,465	20%
Dayton	\$40,840	\$13,475	\$54,315	12%
Champaign	\$22,320	\$6,024	\$28,344	6%
Peoria	\$21,365	\$7,093	\$28,458	6%
Chicago	\$17,055	- - -	\$17,055	4%
Indianapolis	\$81,385	\$23,235	\$104,620	23%
Indiana	\$102,660	\$28,884	\$131,544	29%

COMPETITIVE SITUATION

With marketing endeavors, one must judge their effectiveness in a competitive context. The challenge for Indiana is especially difficult given its small marketing budget. In addition, the State has traditionally had a weaker image than its primary, nearby competitors. Consequently, before reviewing the impact of the advertising, we consider the overall image of Indiana and that of other nearby states. The State has done this type of competitive profiling over the past several years and it is clear that consumers have relatively well defined images of the various states. However, Indiana must continue to assess the competitive situation as it attempts to change its image – and competitors make similar attempts.

The respondents in the Advertising Effectiveness Study were asked to rate various attributes relative to Indiana and its key competitors. The states were rated via the use of a 5-point scale, where a higher rating is better; with this scale, a rating of 3.5 or higher is good. Ratings of “3” or lower indicate that the State does not currently have a particular image. The attributes used this year differed somewhat from those used previously. As such, the results cannot be compared to those of previous studies.

The key attributes for Indiana included being welcoming, simplistic, relaxing, and peaceful. These descriptors are similar to those used in past studies, which revealed that one of the State’s key images was having a welcoming personality. **This year, two highly rated attributes suggest a change in Indiana’s image - it was rated fairly highly for being beautiful and full of places to discover.**

Despite some of Indiana’s fairly high ratings, the competitive situation remains difficult. **In a competitive context, the only above average ratings for Indiana are for being welcoming, relaxing and simplistic.** While the ratings for beautiful and full of things to discover are high, other states received higher ratings.

Ratings of Indiana

State is...	Indiana
Welcoming	3.57
Simplicity	3.57
Relaxing	3.56
Peaceful	3.52
Beautiful	3.49
Full of places to discover	3.41
Charming	3.34
Has arts & culture	3.29
Fun	3.25
Entertaining	3.22
Refreshing	3.22
Engaging	3.16
Modern	3.11
Rejuvenating	3.08
Unique	3.07
Lively	3.04
Exciting	2.99
Adventurous	2.94
Action-packed	2.89

In reviewing the other states, many of the same images persist:

- **Michigan** – has the highest overall image this year, with above average ratings in every category. The areas where Michigan does best competitively include being refreshing, rejuvenating and adventurous. It is also viewed as being more welcoming than Indiana.
- **Illinois** – is viewed as being more fun and exciting, modern, lively and full of arts and culture.
- **Kentucky** – is viewed as peaceful and beautiful and more welcoming than Indiana.
- **Ohio** – has the weakest image overall - no specific strengths are noted in a comparative context.

Image Attribute Ratings					
Image – State is...	IN	MI	KY	OH	IL
Welcoming	101	103	102	94	99
Simplistic	108	102	104	94	92
Relaxing	104	103	104	93	96
Peaceful	103	104	105	95	92
Beautiful	98	104	105	95	97
Full of places to discover	96	104	100	93	106
Charming	99	105	102	94	100
Has arts & culture	96	101	92	97	114
Fun	96	103	97	95	109
Entertaining	94	103	97	96	110
Refreshing	97	106	103	93	101
Engaging	95	105	99	95	106
Modern	95	103	89	99	114
Rejuvenating	96	106	100	96	102
Unique	94	104	101	94	107
Lively	92	103	96	95	114
Exciting	92	104	98	94	112
Adventurous	91	107	99	95	108
Action-packed	92	104	95	96	113

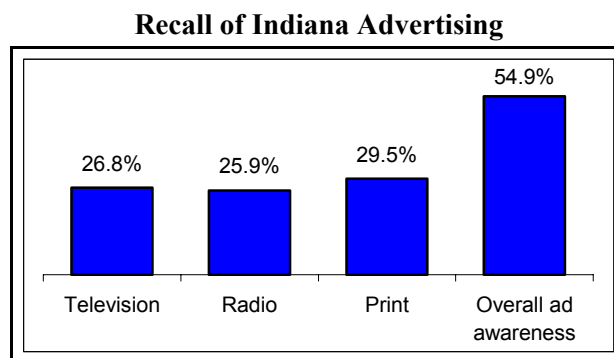
Currently, Indiana’s points of differentiation include welcoming and relaxing. The State has made progress in communicating the fact that it is full of places to discover, but it needs to continue convincing consumers that it is fun, exciting, and unique.

AWARENESS

Advertising Effectiveness research considers the impact of advertising on consumers' selection of a destination and the decision-making process. The power of an ad is built on consumer exposure. Consequently, the first step in the promotional process is reaching potential visitors. Here, the first measure of effectiveness is "reach," or the number of households that recall seeing some portion of the marketing campaign.

While traditional measures of advertising recall involved describing advertising to consumers and asking them to indicate their recall, this methodology actually asks consumers to view the advertising via the Internet and then to indicate recall. Since advertising performs in a competitive context, the ads from four competitive states were included. These findings provide a context for comparing the effectiveness of the Indiana campaign. As noted, Indiana used nine 15-second TV ads, which ran in pairs to produce 30-second commercials, seven radio ads and a number of co-op print ads. The nine ads used this year included six from 2004, and an additional three which were added in 2005.

Of the three media - television, radio and print - awareness of the print advertising was strongest – but only slightly. This year, the print recall rating was almost exactly the same as that recorded in 2004. The levels of recall for TV increased slightly from 18.7% to 26.8%, and recall of radio increased from 18.9% to 25.9%. As such, overall advertising recall was significantly higher. **In total, 54.9% of respondents recalled one of Indiana's ads, compared to 40.2%, in 2004.** This finding indicates that this year's media schedule was more effective. Nonetheless, it is difficult to evaluate these findings without a competitive context.



As noted, competitive ads from several states were included in the study to provide a competitive context. Two 30-second radio ads from Ohio were included, and recall of the Indiana ads was much higher – with the Ohio ads earning just a 9.8% recall rating.

Advertising Awareness	Radio
Indiana	25.9
Ohio	9.8%

TV ads from all four competitors were included. The highest level of recall was for Ohio, at 38.5%, followed by Michigan, with recall of 30.8%. The recall ratings for Indiana and Illinois' advertising were similar, and recall of the Kentucky ads was slightly lower.

Advertising Awareness	TV
Indiana	26.8%
Michigan	30.8%
Kentucky	23.6%
Illinois	26.2%
Ohio	38.5%

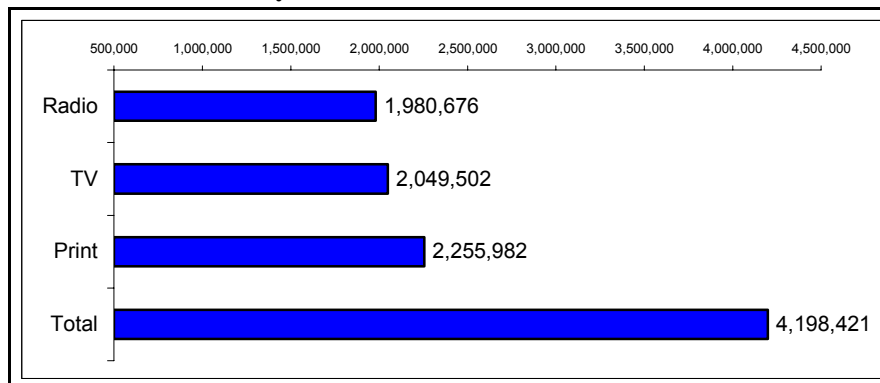
In addition to its TV campaign, Indiana has a co-op print ad program. Overall, about 30% of respondents recalled the print ads, a number higher than recall for either TV or radio. When recall for competitive print advertising was considered, Indiana did slightly better than Ohio, and significantly better than Kentucky.

Advertising Awareness	Print
Ohio	28.3%
Kentucky	18.4%
Indiana	29.5%

Of course, these comparisons are not comprehensive. It is likely that the media plan for each state includes markets which are not considered here. Still, these comparisons provide a good measure of how prevalent the Indiana advertising is within its chosen markets. This can be considered a measure of "share of voice" and, as such, is a valid way to consider competitive context.

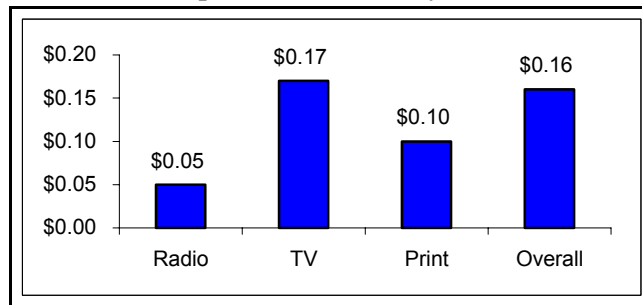
The reach of the campaign can also be considered by translating the percentage of recall into the actual number of households that recalled the advertising. Each medium reached about 2 million households, and the total campaign reached about 4.2 million households throughout the various geographic areas.

Reach by Media – In Number of Households



At the same time, while the media reached similar numbers of households, the cost for these media differed. As such, we consider the comparative cost to reach an aware household for each medium.

Cost per Household – by Media



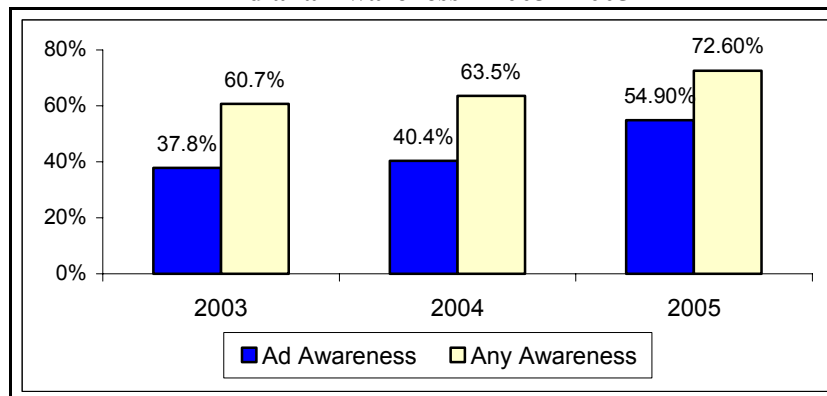
The respondents were asked to indicate other types of information they had seen or received since January. **Indiana generated reasonable recall for these ancillary media. While Illinois earned the strongest recall rating for its public relations efforts, Indiana's rating was superior to that of any other state. In addition, Indiana earned the highest recall of e-mail and direct mail promotions.** Again, the survey was conducted among Indiana's target audience; still **the State is performing competitively.**

Recall of Ancillary Media

Other information	MI	KY	IN	OH	IL
Saw an article or story	20.5%	15.6%	22.9%	15.6%	23.0%
Received an e-mail promotion	30.2%	25.8%	33.4%	26.7%	32.4%
Received direct mail	5.9%	4.0%	9.8%	5.1%	8.4%

When the total awareness ratings for the marketing efforts are combined, 72.6% of the households claimed to recall some type of Indiana marketing. This number translates to 5.6 million households. **Recall of both advertising and the total marketing effort are significantly higher this year, showing improved marketing efficiencies.**

Indiana Awareness – 2003 - 2005

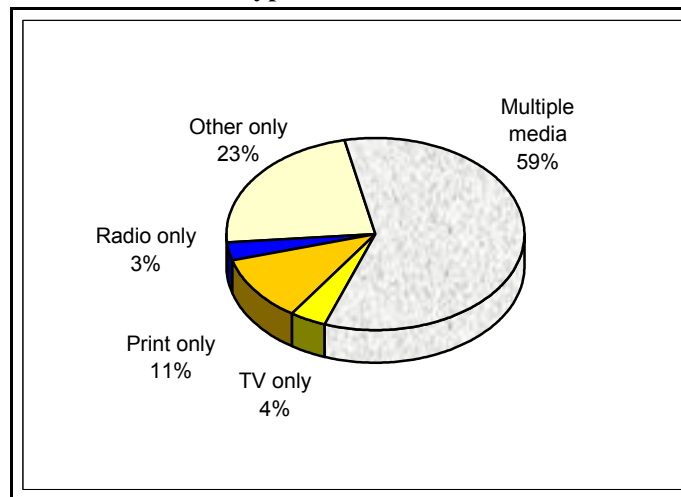


The findings also indicate that the other states are reaching the majority of the audience. Indiana is doing a good job – especially given its smaller budget – but the competition is strong and Indiana must continue to work hard to convince people to choose Indiana over other options.

Given that Indiana used an integrated media plan, it is also helpful to know how the various elements interacted. About one-third of respondents recalled exposure to multiple media, with PR having the strongest single reach. **Obviously, the integrated media plan is working, as the various media are creating synergistic reinforcement. The ancillary media did a good job of extending the reach of the advertising.**

State	Any Awareness
Ohio	81.2%
Michigan	75.9%
Indiana	72.6%
Illinois	77.6%
Kentucky	72.9%

Type of Awareness



ADVERTISING MESSAGE

The first step in developing an effective marketing effort is getting the message to a wide audience. Advertising does not influence people if they are not exposed to it. However, reaching people is only effective if the message *hits home*. Ideally, the advertising communicates a meaningful message and fulfills pre-determined communication objectives. In addition, the advertising has to be at least as effective as that launched by the competition. To determine whether the advertising is delivering a meaningful and motivational message, the survey respondents were asked to view the ads and then to rate the campaign of each state. Ads from Indiana, Ohio, Michigan, Kentucky and Illinois were included, and descriptions and pictures of the ads appear in the Appendix.

Using a 5-point rating scale, where the higher the number the stronger the respondent's agreement that the advertising fulfilled the criteria, the respondents evaluated each campaign by seven criteria:

- Makes you more interested in traveling the State
- Left you wondering about the location and wanting more information
- Makes you interested in visiting the State's Website
- Makes the State seem fun and exciting
- Makes the State appear scenic and beautiful
- Shows something unique and remarkable about the State
- Portrays the State as a place full of unexpected discoveries

Generally, on this 5-point scale, the goal is "4" or higher. SMARI has used this scale to rate travel advertising for myriad states and destinations and, relative to travel advertising, a rating of "4" or higher is sometimes achieved though not consistently. We find that "3.75" is considered *good* for travel ads; a score of "3.5" is strong; and scores above "3.0" are considered acceptable. Ratings below "3.0" indicate areas of weakness and suggest that the intended message is not being effectively communicated.

All the ratings for Indiana's campaign are at or above 3.5, except that for *generating interest in the Website* (although Indiana's rating was as high as any of the competitors). **The strongest ranking was for making the State seem scenic and beautiful – which is a major change in the State's existing image.** Indiana's ads also do a good job of communicating other key messages, including that it has unique and remarkable attractions and is full of unexpected discoveries. As such, the advertising creates interest in visitation.

From a competitive standpoint, the Indiana ads do fairly well – although both Illinois and Kentucky launched strong campaigns. The Ohio and Michigan campaigns earned significantly lower ratings and were not as effective in generating interest in traveling to those states. **Indiana's advertising campaign builds on a successful theme, expands its ability to generate consumer interest in visitation, and is beginning to change the State's image.**

Advertising Ratings

Criteria	IN	IL	KY	MI	OH
Makes you more interested in traveling within the state	3.6	3.7	3.6	3.2	3.3
Leaves you wondering about location & wanting more info	3.5	3.3	3.5	3.2	3.2
Makes you interested in visiting the state's Website	3.4	3.4	3.4	3.1	3.2
Makes the state seem fun and exciting	3.5	3.6	3.6	3.2	3.3
Makes it appear scenic and beautiful	3.7	3.6	3.8	3.3	3.3
Shows something unique & remarkable about the state	3.6	3.6	3.6	3.0	3.2
Portrays it as a place full of unexpected discoveries	3.6	3.6	3.6	3.2	3.2

In terms of tracking, three attributes have been used over the past three years. A comparison shows that the ratings in these three areas have steadily improved and, in 2005, are significantly better. **Most importantly, the greatest improvement with the campaign is in making people more interested in traveling Indiana.**

Attribute Tracking 2003 - 2005

Criteria	2003	2004	2005	Difference since 2003
Makes you more interested in traveling within the State	3.19	3.45	3.59	0.40
Left you wondering about location & wanting more info	3.10	3.47	3.49	0.39
Makes you interested in visiting State Website	3.08	3.37	3.44	0.36

These findings are positive given the strong improvement for Indiana since last year. In addition, these findings reflect the ratings of the State's overall image. **Seemingly, the ads are beginning to improve Indiana's image, making it seem more scenic, exciting and full of interesting and unique things to do. As a result, people are more interested in visiting the State.**

IMPACT OF THE ADS - IMAGE

So far, the findings suggest that Indiana's advertising is positively influencing consumers' image of the State. To further explore this issue, the attitudes among those who saw the advertising are compared to those who did not.

Before the respondents were exposed to any of the ads, they were asked to rate the states by several criteria. A comparison of the ratings of those who recalled seeing ads to those who were not exposed highlights the influence of the advertising on the respondents' perceptions of Indiana. **The findings are quite positive, as those who saw the advertising are significantly more positive about Indiana. There was strong impact in several areas, including being beautiful, being full of places to discover, having arts and culture and being unique and fun.**

Perceptions of State – Exposed vs. Non-exposed

State is...	Did Not See Ads	Saw Ads	Diff.
Beautiful	3.73	3.29	0.44
Full of places to discover	3.60	3.21	0.39
Refreshing	3.42	3.04	0.38
Has arts & culture	3.49	3.11	0.38
Unique	3.26	2.89	0.37
Fun	3.45	3.08	0.37
Engaging	3.34	2.96	0.37
Welcoming	3.76	3.39	0.37
Entertaining	3.40	3.03	0.37
Exciting	3.17	2.81	0.37
Rejuvenating	3.27	2.91	0.35
Lively	3.22	2.88	0.34
Charming	3.53	3.21	0.32
Adventurous	3.12	2.80	0.31
Relaxing	3.75	3.44	0.31
Peaceful	3.68	3.38	0.30
Modern	3.26	3.01	0.26
Action-packed	3.03	2.78	0.25
Simplistic	3.66	3.52	0.14

This campaign had a positive influence on consumers' attitudes and communicated the desired messages. This campaign began to change the image of the State last year and the additional ads further contributed to this process.

IMPACT OF THE ADVERTISING - TRAVEL

Thus far, the research indicates that Indiana's 2005 advertising has been effective. The ultimate measure of effectiveness is the ability to increase travel to the State. Yet, measuring the effectiveness of advertising in terms of travel is difficult – as even if the State did not advertise people would visit. Therefore, the goal becomes determining a way to measure how much *incremental* travel resulted from the advertising. In this light, the assessment focuses on the *level of travel* among those who saw the ads versus those who did not. The assumption is that the level of travel among those who did not see the advertising represents that baseline level, and any additional travel which occurred among those who did see advertising is a result of that advertising.

The initial findings indicated that Indiana's advertising and marketing efforts achieved wide reach and communicated meaningful messages, suggesting that the marketing will have a positive influence on visitation to Indiana. **In fact, the level of visitation among those who recalled advertising was 10.3 points higher, and it was 16 points higher among those who saw either advertising or ancillary marketing efforts (public relations/e-mail and direct mail).** Since this year the campaign reached a significantly larger audience, the combination of strong reach and strong incremental travel should result in a large number of incremental trips being made to Indiana.

Impact of Indiana Marketing Efforts

Marketing	Exposed	No Exposure	Impact
Advertising	37.5%	27.2%	10.3
Any marketing	36.4%	20.4%	16.0

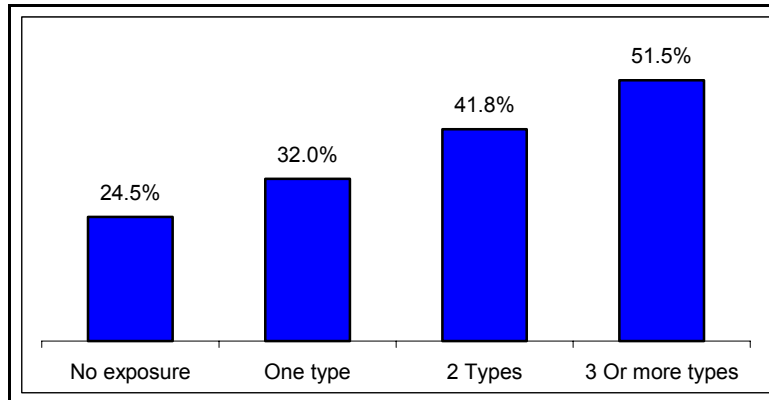
In a competitive context, the impact of Indiana's marketing efforts was stronger than that recorded for the other states. Michigan had the next highest rating, followed by Kentucky. Predictably, Indiana generated the highest level of visitation among these markets (since they are specifically Indiana's markets), but the level of visitation among those who were exposed to the marketing is much higher than for the other states.

Impact of Indiana Marketing Efforts Competitive Context

States	Any Marketing	No Ads	Impact
Ohio	24.4%	20.2%	4.2
Michigan	25.7%	12.0%	13.7
Indiana	36.4%	20.4%	16.0
Illinois	29.1%	31.6%	0.0
Kentucky	24.9%	17.9%	7.0

Another issue in terms of impact is exposure to multiple media. In this case, the level of visitation increased as people saw more advertising, suggesting that a media campaign with strong overlap will be the best way to increase visitation.

Impact of Exposure to Advertising or PR



TRIP SPECIFICS

In addition to impacting behavior relative to generating additional trips to Indiana, the advertising may also influence the specific details of consumers' trips. Potentially, the advertising may influence visitors to stay longer, participate in different activities or spend more money. A review of the specifics of visitors' trips helps to uncover any additional influences.

Indiana typically hosts much of its leisure visitation during the summer months. This was the case among people in this study. The advertising had some impact on those who saw it, promoting additional travel during the summer. It makes sense that the advertising spurred trips soon after the campaign was launched.

Travel Seasons

Season	Ad Effectiveness 2005 Overall	Saw Ad	Did not see ads
Spring	26.3%	24.5%	28.2%
Summer	43.7%	45.9%	41.5%
Fall	24.5%	22.8%	26.2%
Winter	5.5%	6.9%	4.1%

Last year, the advertising seemed to help influence longer trips, but that was not the case this year. Still, the advertising may have influenced more people with children to visit. As a result, the average party size among those who saw the advertising was higher. This is important given that larger travel parties tend to spend more money.

Overnight Trip Specifics

Trip Specifics	Overall	Saw Ads	Did Not See Ads
Duration of Trip – Nights	2.2	2.2	2.2
Number of People on Trip	3.3	3.5	3.0
% Of Trips with Kids	32.0%	35.8%	23.8%

Among Indiana visitors, 72.9% indicated using paid accommodations, while the remainder stayed with family or friends. Accommodation usage did not differ significantly between ad aware and non-aware consumers.

However, since the advertising influenced larger travel parties, those who saw the advertising spent about 7% more during their visit. Those who saw advertising actually spent less on lodging, but more in every other category. The biggest dollar differences included expenditures for transportation and shopping. The largest percentage increases are noted for entertainment and recreation.

This year, average expenditures per trip were \$625, significantly higher than the \$550 reported last year. Expenditures among the ad aware were \$645 per trip compared to \$604 for those without awareness.

To assess visitors in total and to review any advertising influence, it is important to know what people did while visiting Indiana. The most popular activities included enjoying scenic beauty, dining at unique restaurants and shopping.

**Overnight Visitors
Average Expenditures**

Expenditures for...	Overall	Saw Ads	Did Not See Ads
Lodging	\$147	\$138	\$167
Meals	\$113	\$114	\$110
Attractions	\$54	\$56	\$49
Recreation	\$13	\$14	\$11
Novelties/Souvenirs	\$29	\$32	\$27
Shopping	\$108	\$112	\$99
Entertainment	\$32	\$38	\$22
Transportation	\$93	\$100	\$83
Other	\$37	\$40	\$34
Total	\$625	\$645	\$604
Less Transportation	\$532	\$546	\$521
Per-person/Per-day	\$86	\$84	\$91

Visitors' Activities	%
Enjoy scenic beauty	54.9%
Dine at restaurants unique to the area	52.0%
Shop	46.1%
Go to lakes, rivers, other natural features	40.7%
Visit friends or relatives	38.0%
Take scenic drives or driving tours	33.4%
Visit small or quaint towns	33.3%
Visit historic sites	30.6%
Visit state or national parks	21.0%
Visit zoos or child-oriented museums	19.9%
Go hiking or biking	18.8%
Visit larger more metropolitan cities	18.6%
Attend fairs or festivals	17.7%
Gamble at a riverboat casino	17.5%
Look for distinctive architecture	16.8%
Shop for antiques	16.2%
Visit nightclubs or bars	14.9%
Outdoor activities – e.g., fishing/hunting/ canoeing/boating/sailing	14.8%
Go camping	14.0%
Visit amusement or theme parks	13.0%
Visit art or cultural museums	12.3%
Go to a music concert	9.6%
Attend sporting events	9.1%
Attend musical performances – e.g., symphony/opera/theater/ballet	8.3%

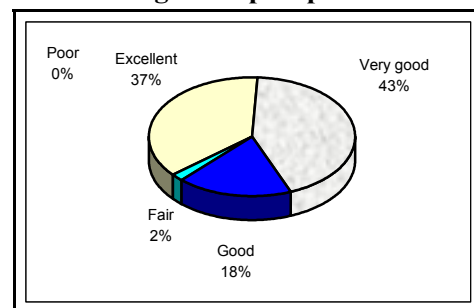
The most popular activities among those who saw advertising included scenic drives, historic sites, outdoor activities, lakes and rivers and visiting amusement parks. Activities not influenced by the ads included gambling and entertainment, both nightlife and symphony / opera. Apparently, the ads – and the subject of the ads – are influencing specific types of trips. **The ads show scenery, history and amusement parks –the activities that people were most likely to report – another indication that the advertising influenced behavior.**

Visitors' Chosen Activities

Visitors' Activities	Ads	No Ads	Diff.
Take scenic drives or driving tours	39.6%	23.0%	16.6%
Visit historic sites	35.9%	22.3%	13.6%
Outdoor activities – e.g., fishing/hunting/ canoeing/boating/sailing	19.5%	7.1%	12.3%
Go to lakes, rivers, or other natural features	43.9%	32.6%	11.3%
Visit amusement or theme parks	17.9%	7.0%	11.0%
Attend fairs or festivals	22.0%	11.3%	10.7%
Enjoy scenic beauty	58.2%	50.0%	8.2%
Go camping	15.7%	7.7%	8.0%
Visit larger more metropolitan cities	18.7%	14.4%	4.4%
Visit with friends or relatives	38.8%	34.9%	3.9%
Visit state or national parks	22.7%	18.9%	3.9%
Shop	49.0%	45.2%	3.8%
Visit zoos or children-oriented museums	22.0%	18.4%	3.6%
Look for distinctive architecture	16.6%	13.2%	3.5%
Go antique shopping	16.7%	13.3%	3.3%
Go hiking or biking	19.0%	15.8%	3.2%
Attend sporting events	8.9%	8.4%	0.5%
Visit small or quaint towns	33.8%	33.3%	0.5%
Visit art or cultural museums	13.0%	12.6%	0.4%
Go to a music concert	9.5%	10.1%	-0.6%
Eat at restaurants unique to the area	53.6%	54.5%	-1.0%
Attend musical performances – e.g., symphony/opera/theater/ballet	7.3%	12.0%	-4.7%
Visit nightclubs or bars	12.0%	17.2%	-5.2%
Gamble at a riverboat casino	14.5%	20.5%	-6.0%

On a final positive note, consumers reported having good experiences in the State. In fact, all visitors rated their trip at least “fair,” with the majority saying that the experience was much better. Here, a great deal of repeat visitation is suggested.

Rating of Trip Experience



ECONOMIC IMPACT

Having reviewed the reach and impact of the advertising campaign as well as consumers' behavior while they visited Indiana, we can calculate the economic impact of the marketing efforts. The actual measure of impact is relatively conservative and considers only travel among those who saw the advertising. In addition, not all travel among this group is considered. Rather, only the *incremental* travel, or additional travel which can be linked to advertising, is counted. To determine this result, the measure of recall is first projected across all the advertising and used to determine the total number of exposed households. The measure of incremental travel is used to determine the number of trips represented by these households. The average trip expenditures are then factored in to determine the overall economic impact of the campaign.

This year, the findings thus far have been quite positive. Advertising recall improved and average trip expenditures increased, although the level of incremental travel was a bit lower. The result is that the economic impact generated by the campaign was higher than in 2004. **The following calculations suggest that the overall impact of the campaign was over \$508 million and that the ROI increased from \$618, in 2003, to \$857 in 2005.** Even when the impact of just the paid advertising is considered, the impact is over \$240 million, for an ROI of \$411.

Total Economic Impact of the Campaign

	Advertising Recall 2004	Advertising Recall 2005	Any Marketing 2004	Any Marketing 2005
Households	7,134,522	7,647,397	7,134,522	7,647,397
Awareness	40.40%	54.90%	63.50%	72.60%
Aware HHS	2,882,347	3,677,817	4,530,421	4,863,561
Incremental travel	13.80%	10.30%	20.10%	16.00%
Incremental trips	397,764	378,815	910,615	778,170
Average expenditures	\$575	\$645	\$550	\$654
Total	\$228.7 million	\$278.9 million	\$500.8 million	\$581.0 million
Total Tax Generated	\$13.7 million	\$16.7 million	\$30 million	\$34.9 million
Expenditures	\$810,310	\$677,973	\$810,310	\$677,973
ROI	\$282	\$411	\$618	\$857
Tax ROI	\$17	\$25	\$37	\$51

Another way to consider the return on investment is to calculate the tax funds generated by this effort. To develop a completely accurate number would involve a detailed analysis of the different types of taxes generated at the state, county and local level. However, a conservative estimate can be achieved by using the 6% sales tax figure. This indicates that the incremental travel to Indiana generated almost \$35 million in taxes for Indiana. Based on this number, the ROI for advertising alone was \$25, and the overall ROI was \$51 in tax revenue generated by each \$1 invested in marketing.

TACTICAL CONSIDERATIONS

In addition to providing information about the effectiveness and impact of the campaign, this research provides information that Indiana Tourism can use to design future marketing and advertising efforts. These issues include a review of who sees the advertising, who responds to the ads, and the comparative performance of the four target markets.

Demographics

In evaluating the advertising campaign, one interesting finding relates to the demographics of those who recalled the ads. **The profile shows that those *with advertising awareness* earned lower household incomes and claimed lower levels of education than did those with no recall.** In the past, the ad aware tended to be more upscale than the non-aware. This year, as in 2004, however, the impact of the advertising among this group was greater, suggesting that targeting a slightly lower demographic might make sense.

Demographic Profile

Demographics	No Exposure	Saw Ads
Married	64.1%	68.1%
Divorced	12.5%	12.9%
Widowed	2.6%	2.5%
Single	19.5%	16.0%
High school or less	13.3%	18.7%
Some college/tech school	36.2%	43.3%
College graduate	34.4%	26.3%
Post grad degree	15.7%	11.4%
Male	28.2%	27.0%
Female	71.8%	73.0%
People in HH	2.8	3.0
Children in HH	0.9	1.0
Age	41.7	43.5
Income	\$62,051	\$57,193

Market Performance

The performance of the various markets needs to be considered as well. (This analysis considers awareness of television and radio, since this is where costs can be allocated by market). When the overall impact of the campaign is considered relative to incremental travel, **the importance of the Chicago market is clear, as visitors from this area generated over \$113 million in economic impact.** Chicago produced the best ROI – basically because of low spending levels in this area. This was probably supported by other spending from some northern Indiana destinations, which helped generate this ROI. This year the in-state ROI numbers are strong, as is the ROI for Champaign. The lowest ROIs were recorded for Dayton and Peoria.

Market Performance

	Cincinnati	Dayton	Champaign	Peoria	Chicago	Indianapolis	Indiana
HHS	731,090	451,327	313,009	210,006	2,953,672	894,920	1,145,095
Awareness	47.3%	44.9%	48.2%	39.2%	47.2%	76%	71.7%
Aware HHS	345,786	202,519	150,848	82,355	1,395,436	679,795	820,651
Increment	8%	2%	12%	3%	11%	10%	10%
# Incremental Trips	26,971	4,253	18,253	2,306	157,684	67,979	82,065
Avg. Trip Expenditures	\$645	\$645	\$645	\$645	\$722	\$645	\$645
Economic Impact	\$17.4M	\$2.7M	\$11.8M	\$1.5M	\$113.8M	\$43.8M	\$52.9M
Advertising Expenditures	\$93,465	\$54,315	\$28,344	\$28,458	\$17,055	\$104,620	\$131,544
ROI	\$186	\$51	\$415	\$52	\$6,675	\$419	\$402

These findings can help Indiana Tourism make the best use of its advertising budget. This year, the ROI for most of the markets was quite strong, indicating a good allocation of dollars between markets. Dayton and Peoria are newer markets and it may take more time to develop travel from these areas.

CONCLUSIONS & RECOMMENDATIONS

Conclusions:

- **The overall impact of the campaign was in excess of \$581 million, compared to \$508 million in 2004, an increase of 14%.** This success was achieved with a significantly lower advertising budget. Given the money expended on the marketing efforts, each \$1 in advertising expenditures generated \$411 in visitor spending; and when the total marketing effort is considered, the ROI is \$857. Relative to tax revenues, each \$1 invested in advertising generated \$25 in taxes, and the overall marketing effort generated a \$1:\$51 ROI.
- **Indiana continues to be viewed as a welcoming, relaxing, simple place to visit.** The most notable improvements in image relate to beauty and being full of places to discover. While Indiana's image is changing slowly (in part due to the low level of advertising) the State is making progress and consumers are coming to consider the State more fun and cultured.
- **The link between the State's image and the tourism advertising campaign are clear both in terms of consumers' reactions to the ads – and the impact on their attitudes. Indiana's ads were rated as positively as the best competitive ads and earned strong ratings for showing Indiana as scenic and beautiful and highlighting unique and remarkable sites.** Most importantly, the consumers who recalled advertising expressed much more positive attitudes about Indiana. The areas where ad-aware consumers indicated the greatest change for the good included being beautiful, full of places to discover, fun and exciting.
- **The positive impact of the advertising is even more encouraging because it reached a larger audience this year.** The level of advertising awareness rose from 40%, in 2004, to 54.9%, in 2005.
- **Indiana earned the highest advertising awareness ratings for both radio and print.** The State also did a good job of using PR as well as e-mail and direct mail promotions to extend the reach of the campaign. When these ancillary media are considered, Indiana's campaign reached over 72% of the target market.
- **In total, 4.2 million households reported awareness of Indiana's advertising, and 5.6 million households recalled some element of the marketing campaign.** In part, the increase in awareness resulted from building on the successful 2004 campaign and expanding the sites featured in the ads. Repetition of the campaign helped build awareness and familiarity and leveraged Indiana's smaller budget quite effectively.

- **Given that the ads are more effective in communicating the key messages, it is not surprising that the campaign was effective in generating additional visitation.** This year, the incremental impact of the overall campaign was 16 points, a number slightly lower than that recorded in 2004 – but the impact was upon a larger audience. In addition, the impact from Indiana’s marketing efforts was stronger than that of any other state tested.
- **Synergy between the various media is important;** the research indicates that the impact of the advertising increases as consumers see more than one medium.
- **In addition to generating additional trips to the State, the advertising is seemingly helping to increase economic impact by influencing per-trip expenditures.** Those who saw the advertising spent about 7% more per trip than did those who were not exposed to the ads.
- **Again, as in 2004, people who recalled the Indiana ads claimed both lower levels of income and education than did those with no recall.** This finding may be a function of the way the ads were targeted or to the appeal of the creative.
- **Significant differences in effectiveness were noted between the target markets.** Chicago continues to be the most important market, generating both the strongest economic impact and the highest ROI. This year, in-state performance was much stronger, with high levels of economic impact and ROI.

Recommendations:

- **The current campaign is working well on many levels.** The campaign is beginning to change consumers’ attitudes about the State *and* it is generating incremental travel. This campaign should remain the focus for advertising, while additional ads can be developed to highlight other unique sites throughout the State. The theme in the ads should focus on Indiana’s scenic beauty, fun and excitement.
- **The current media schedule is working fairly well, generating high levels of advertising awareness.** One goal for future media plans should be to **ensure that consumers are exposed to multiple media to increase the impact of the overall campaign.**
- **The cost to reach an aware household is lower for print than television. But, the existing split between these two media works well.** Radio is actually cheaper and, therefore, more efficient per household. Of course, because its impact is not as great, it works well as a support to TV and print.

- **As in 2004, Indiana should consider its targeted demo and how best to focus the campaign.** While consumers with higher incomes and education levels have more disposable income, households from somewhat lower socio-economic groups may be better targets. Continuing to target this demographic seems the best option.
- The selection and allocation of resources among markets is an important factor in maximizing economic impact and ROI. **Chicago is a prime market and Indiana should continue to search for ways to increase its presence there. The in-state markets seem to be working well and to be good options for generating trips. The two markets with the weakest performance were Dayton and Peoria, which are relatively new markets.** As such, it may take time to generate travel from these areas. Thus, the current allocation of funds between markets seems quite good although, as additional money becomes available, consideration should be given to increasing expenditures in the Chicago area.

APPENDIX

Advertising Effectiveness Survey – 993121
Indiana Tourism

October, 2005

Thank you for participating in our travel survey. Your opinions are valuable to us! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

This survey will take approximately 20 minutes to complete. Before you begin, there are a few things to note about the survey:

1. For most questions, simply click on the button of your response and then click on the Next button to go on to the next question.
2. If you need to go back to the preceding question to change your response, click on the Previous button.
3. For some questions, you will need to scroll down to respond to all the questions on a screen.
4. You will be viewing actual print and television ads as part of this survey, and it may take a short time for the ads to load onto your computer for viewing.

To stop at any point, close the browser window. The survey will terminate and you will not be able to re-enter.

[THREE LINKS – INDIANA(in LINK) & INDIANAPOLIS(ip LINK) WILL NOT GET QSX. AND OTHER LINK WHICH WILL GET QSX.]

INDIANA & INDIANAPOLIS LINKS GETS – IN, KY & OH ADS
OTHER LINK GETS ADS ACCORDING TO INSTRUCTION BELOW QSX.

SX. Which of the following markets is closest to where you live?

- 1... Cincinnati
- 2... Dayton
- 3... Champaign
- 4... Peoria
- 5... Chicago

[EVERYONE GETS IN 3 RANDOMLY CHOSEN TV AND 3 RANDOMLY CHOSEN RADIO INDIANA ADS PLUS IF SX = 1 OR 2 GET OH, KY ADS IF 3, 4, OR 5 GET MI, IL ADS]

S1. Who in your household is primarily responsible for making decisions concerning travel destinations?

- ☐ Me
- ☐ My spouse (TERMINATE)
- ☐ Jointly with my spouse
- ☐ Someone else (TERMINATE)

S2. Do you normally take at least one overnight, pleasure trip per year?

- ☐ Yes
☐ No **TERMINATE**

S3. Which of the following best describes the Internet connection you are using for this survey?

- ☐ Dial up
☐ Cable modem
☐ DSL
☐ Satellite
☐ Don't Know

1. Please consider the following statements concerning [INSERT STATE]. Indicate how much you agree with each statement by marking a number on the 5 point scale, where the more you agree with the statement, the higher the number. A rating of 5 means that you *strongly agree* with the statement, while a 1 means you *strongly disagree*. You can use any number from 1 to 5.

ASK FOR INDIANA AND ONE OTHER STATE, CHOSEN RANDOMLY
INDIANA MICHIGAN
KENTUCKY
OHIO
ILLINOIS

How much do you agree that [INSERT STATE]...	Strongly disagree				Strongly agree
Is welcoming	1	2	3	4	5
Is engaging	1	2	3	4	5
Is entertaining	1	2	3	4	5
Is simplicity	1	2	3	4	5
Is full of places to discover	1	2	3	4	5
Is exciting	1	2	3	4	5
Is unique	1	2	3	4	5
Is fun	1	2	3	4	5
Is lively	1	2	3	4	5
Is beautiful	1	2	3	4	5
Has arts and culture	1	2	3	4	5
Is relaxing	1	2	3	4	5
Is action-packed	1	2	3	4	5
Is adventurous	1	2	3	4	5
Is charming	1	2	3	4	5
Is modern	1	2	3	4	5
Is rejuvenating	1	2	3	4	5
Is refreshing	1	2	3	4	5
Is peaceful	1	2	3	4	5

2. Since the first of the year, which of the following states was the destination for a leisure trip that included an overnight stay?

SELECT ALL THAT APPLY

- ☐ MICHIGAN
- ☐ KENTUCKY
- ☐ INDIANA
- ☐ OHIO
- ☐ ILLINOIS
- ☐ NONE OF THE ABOVE

(IF Q2=INDIANA, ASK Q3-10 ABOUT TRIP TO INDIANA. IF RESPONDENT DID NOT SELECT INDIANA, RANDOMLY SELECT ANOTHER STATE SELECTED IN Q2 AND ASK ABOUT THAT **ONE** STATE)

Now, please give us some information about the trip you took this year to [INSERT NAME OF STATE].

3. For the most recent trip you took to [INSERT STATE], in what season did you visit?
- ☐ Winter (December - February)
 - ☐ Spring (March - May)
 - ☐ Summer (June – August)
 - ☐ Fall (September- November)
4. As part of your trip, did you...?
- ☐ Use paid accommodations
 - ☐ or Stay with family and/or friends
5. Including yourself, how many people were on this trip? **RECORD NUMBER** _____
6. Were there any children under the age of 18 yrs old on your trip?
- ☐ Yes
 - ☐ No
7. Which of the following places or activities did you visit or participate in as a part of your trip? (Mark all that apply.)
- ☐ Look for distinctive architecture
 - ☐ Visit historic sites
 - ☐ Attend musical performances such as the symphony, opera, theater, or ballet
 - ☐ Visit art or cultural museums
 - ☐ Visit zoos or children-oriented museums
 - ☐ Visit amusement or theme parks
 - ☐ Enjoy scenic beauty
 - ☐ Go to lakes, rivers, or other natural features
 - ☐ Go hiking or biking
 - ☐ Outdoor activities, such as fishing, hunting, canoeing, boating or sailing
 - ☐ Go camping
 - ☐ Go to a music concert
 - ☐ Visit nightclubs or bars
 - ☐ Go shopping
 - ☐ Gamble at a riverboat casino
 - ☐ Eat at restaurants unique to the area (continued next page)

- ☐ Attend fairs or festivals
 - ☐ Go antique shopping
 - ☐ Take scenic drives or driving tours
 - ☐ Attend sporting events
 - ☐ Visit larger more metropolitan cities
 - ☐ Visit small or quaint towns
 - ☐ Visit state or national parks
 - ☐ Visit with friends or relatives
 - ☐ None of the above
8. To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your travel party spent on your most recent trip while in [INSERT STATE]. Please estimate how much your travel party spent in total on...?
- a. Lodging _____
 - b. Meals/Food/Groceries _____
 - c. Attractions _____
 - d. Recreational expenses such as boat rental, golf fees, etc. _____
 - e. Novelties and Souvenirs _____
 - f. Shopping _____
 - g. Entertainment such as admission fees to events or shows _____
 - h. Transportation such as gasoline, auto expenses, auto rental or flight costs _____
 - i. Other _____
9. How many *nights* did you spend in [INSERT STATE] on that vacation?
RECORD NUMBER _____
10. Overall how would you rate the experience you had in the state of [INSERT STATE]?
 Would you say it was...?
- ☐ Excellent
 - ☐ Very Good
 - ☐ Good
 - ☐ Fair
 - ☐ Poor

10a. Most states have advertising slogans they use to promote travel to their state. Please look at the following slogans and match them with the appropriate state.

SHOW EACH SLOGAN, WITH THE LIST OF STATES – ROTATE SLOGANS

- [] Enjoy _____
- [] _____ So Much to Discover
- [] _____ Where the Rivers Run
- [] _____ Great Lakes. Great Times
- [] _____ Unbridled Spirit
- [] _____ Mile After Magnificent Mile

- 1.....Kentucky
- 2.....Illinois
- 3.....Indiana
- 4.....Michigan
- 5.....Missouri
- 6.....Ohio

10b. Please look at the following slogans and select the one that most represents each word. For example, which one is the most *fun*? You can only choose one slogan for each word.

- ☐ Enjoy Indiana
- ☐ Ohio. So Much to Discover
- ☐ Illinois. Mile After Magnificent Mile
- ☐ Michigan. Great Lakes. Great Times.
- ☐ Kentucky. Unbridled Spirit

- ☐ Welcoming
- ☐ Engaging.....
- ☐ Entertaining
- ☐ Simplicity
- ☐ Full of places to discover.....
- ☐ Exciting
- ☐ Unique
- ☐ Fun.....
- ☐ Lively.....
- ☐ Beautiful
- ☐ Arts and culture
- ☐ Relaxing.....
- ☐ Action-packed.....
- ☐ Adventurous
- ☐ Charming
- ☐ Modern
- ☐ Rejuvenating.....
- ☐ Refreshing
- ☐ Peaceful

NOTE: ASK ALL STATE ADS TOGETHER PRINT, TV, THEN RADIO AS LISTED IN ORDER (IF THEY APPLY FOR THAT STATE) – ROTATING STATES ONLY

[VIDINTRO]

Now please review the following state tourism advertising, which includes streaming video clips.

If you have broadband internet access, such as a cable modem, DSL, or a fast connection at work, use the <U>Broadband</U> buttons.

If you have a dialup modem or you're not sure, use the <U>Dialup</U> buttons.

You must have Microsoft Media Player installed.

Illinois - 2 TV

11t_1. Joggers

mms://sms7.omniproductions.net/MDT05_ILTV1.wmv
mms://sms7.omniproductions.net/MDT05_ILTV1a.wmv

11t_2. Statues

mms://sms7.omniproductions.net/MDT05_ILTV3.wmv
mms://sms7.omniproductions.net/MDT05_ILTV3a.wmv

Please click on Dialup or Broadband to view the ad then answer the question.

11ta_1 - 11ta_2

Were you able to view the ad?

1. Yes
2. No → SKIP TO NEXT AD

11tb_1 - 11tb_2

How many times have you seen this TV ad before?

- ☐ Never
- ☐ A few times
- ☐ Many times

If couldn't view both ads, Q11t_1 & Q11t_2, then skip to next ad.

12. Please indicate how much the Illinois ads ...

	Strongly Agree				Strongly Disagree
makes you more interested in traveling within the state.	5	4	3	2	1
leaves you wondering about location & wanting more info.	5	4	3	2	1
makes you interested in visiting the state's website.	5	4	3	2	1
makes the state seem fun and exciting.	5	4	3	2	1
makes it appear scenic and beautiful.	5	4	3	2	1
shows something unique and remarkable about the state.	5	4	3	2	1
portrays it as a place full of unexpected discoveries.	5	4	3	2	1

Indiana Ads - Total of 2 print (one page), 7 radio & 9 TV

[RANDOMLY CHOOSE 3 TV & 3 RADIO]

IN Print

I:\Team David\Ads - Master\Indiana Tourism\2005 Ad Effectiveness\Indiana\

INTour_AAACincy03-04_05.jpg

I:\Team David\Ads - Master\Indiana Tourism\2005 Ad Effectiveness\Indiana\ INTour_MWLiv03-04_05.jpg

(Show ads together – ask as one question)

13p_1.

Have you seen these print ads before?

- ☐ I have seen print ads before
- ☐ I have NOT seen print ads before

Please take a moment to listen to this radio ad.

13r_1. mms://sms7.omniproductions.net/INR04_1.wma
13r_2. mms://sms7.omniproductions.net/INR04_2.wma
13r_3. mms://sms7.omniproductions.net/INR04_3.wma
13r_4. mms://sms7.omniproductions.net/INR04_4.wma
13r_5. mms://sms7.omniproductions.net/INR04_5.wma
13r_6. mms://sms7.omniproductions.net/INR04_6.wma
13r_7. mms://sms7.omniproductions.net/INR04_7.wma

IN Radio

13ra_1 - 13ra_7

Were you able to hear the ad?

1. Yes
2. No → SKIP TO NEXT AD

13rb_1 - 13rb_7.

How many times have you heard this radio ad before?

- ☐ Never
- ☐ A few times
- ☐ Many times

Please take a moment to view this TV ad.

Please click on Dialup or Broadband to view the ad then answer the question.
IN TV Ads 1-9

13t_1. Blue Springs

mms://sms7.omniproductions.net/INT04_1-1.wmv
mms://sms7.omniproductions.net/INT04_1-1a.wmv

13t_2. Dunes

mms://sms7.omniproductions.net/INT04_2-1.wmv
mms://sms7.omniproductions.net/INT04_2-1a.wmv

13t_3. Monument Circle

mms://sms7.omniproductions.net/INT04_3-1.wmv
mms://sms7.omniproductions.net/INT04_3-1a.wmv

13t_4. Paramount

mms://sms7.omniproductions.net/INT04_4-1.wmv
mms://sms7.omniproductions.net/INT04_4-1a.wmv

13t_5. Turkey Run

mms://sms7.omniproductions.net/INT04_5-1.wmv
mms://sms7.omniproductions.net/INT04_5-1a.wmv

13t_6. West Baden

mms://sms7.omniproductions.net/INT04_6-1.wmv
mms://sms7.omniproductions.net/INT04_6-1a.wmv

13t_7. Holiday World
mms://sms7.omniproductions.net/IN05_INT1-1.wmv
mms://sms7.omniproductions.net/IN05_INT1-1a.wmv

13t_8. Madison/ Scenic Byways
mms://sms7.omniproductions.net/IN05_INT2-1.wmv
mms://sms7.omniproductions.net/IN05_INT2-1a.wmv

13t_9. Notre Dame
mms://sms7.omniproductions.net/IN05_INT3-1.wmv
mms://sms7.omniproductions.net/IN05_INT3-1a.wmv

13ta_1 - 13ta_9
Were you able to view the ad?
1. Yes
2. No → SKIP TO NEXT AD

13tb_1 – 13tb_9.
How many times have you seen this TV ad before?
☐ Never
☐ A few times
☐ Many times

14. Please indicate how much the Indiana ads ...

	Strongly Agree			Strongly Disagree	
Makes you more interested in traveling within the state.	5	4	3	2	1
Leaves you wondering about location & wanting more info.	5	4	3	2	1
Makes you interested in visiting the state's website.	5	4	3	2	1
Makes the state seem fun and exciting.	5	4	3	2	1
Makes it appear scenic and beautiful.	5	4	3	2	1
Shows something unique and remarkable about the state.	5	4	3	2	1
portrays it as a place full of unexpected discoveries.	5	4	3	2	1

Kentucky

Total of 5 print (two pages) & 1 TV

I:\Team David\Ads - Master\Indiana Tourism\2005 Ad Effectiveness\Kentucky\

Please take a moment to view these print ads.

15p_1
AAA_final_Page_1.jpg
AAA_final_Page_2.jpg

15p_2

Tourism Reg Ad 1.jpg

Tourism Reg Ad 2.jpg

Tourism Reg Ad 3.jpg

15p_1 - 15p_2.

Have you seen these print ads before?

☐ I have seen print ads before

☐ I have NOT seen print ads before

Kentucky TV

mms://sms7.omniproductions.net/IN05_KYTV1-1.wmv

mms://sms7.omniproductions.net/IN05_KYTV1-1a.wmv

Please click on Dialup or Broadband to view the ad then answer the question.

15ta_1

Were you able to view the ad?

1. Yes

2. No → SKIP TO NEXT AD

15tb_1. How many times have you seen this TV ad before?

☐ Never

☐ A few times

☐ Many times

16. Please indicate how much the Kentucky ads ...

	Strongly Agree				Strongly Disagree
makes you more interested in traveling within the state.	5	4	3	2	1
Leaves you wondering about location & wanting more info.	5	4	3	2	1
makes you interested in visiting the state's website.	5	4	3	2	1
makes the state seem fun and exciting.	5	4	3	2	1
makes it appear scenic and beautiful.	5	4	3	2	1
shows something unique and remarkable about the state.	5	4	3	2	1
portrays it as a place full of unexpected discoveries.	5	4	3	2	1

Michigan

Total of 2 TV (IF UNABLE TO VIEW EITHER TV AD – SKIP Q18)

17ta_1 - 17ta_2

Were you able to view the ad?

3. Yes

4. No → SKIP TO NEXT AD

17tb_1. Beachball/Splashing

mms://sms7.omniproductions.net/MDT05_MITV1.wmv

mms://sms7.omniproductions.net/MDT05_MITV1a.wmv

17tb_2. Sign/City/Bike

mms://sms7.omniproductions.net/MDT05_MITV2.wmv

mms://sms7.omniproductions.net/MDT05_MITV2a.wmv

17tb_1 - 17tb_2

How many times have you seen this ad before?

- ☐ Never
- ☐ A few times
- ☐ Many times

18. Please indicate how much the Michigan ads ...

	Strongly Agree				Strongl y
makes you more interested in traveling within the state.	5	4	3	2	1
leaves you wondering about the location and wanting more	5	4	3	2	1
makes you interested in visiting the state's website.	5	4	3	2	1
makes the state seem fun and exciting.	5	4	3	2	1
makes it appear scenic and beautiful.	5	4	3	2	1
shows something unique and remarkable about the state.	5	4	3	2	1
portrays it as a place full of unexpected discoveries.	5	4	3	2	1

Ohio

8 SETS OF print ads, 2 radio ads & 3 television ads

I:\Team David\Ads - Master\Indiana Tourism\2005 Ad Effectiveness\Ohio\

[RANDOMLY CHOOSE 2 TV & 1 RADIO]

19p_1

D06639_FF_insert_lo3_Page_1.jpg

D06639_FF_insert_lo3_Page_2.jpg

[PUT Q19P_2 & Q19P_3 ON ONE PAGE]

19p_2

D06640_ML_insert_lo3_Page_1.jpg

D06640_ML_insert_lo3_Page_2.jpg

19p_3

D06645_RS_insert_lo1_Page_1.jpg

D06645_RS_insert_lo1_Page_2.jpg

[INDY LINK ONLY WILL GET Q19P_4]

19p_4

M01357_AAA_3_IND_r1.4_Page_1.jpg

M01357_AAA_3_IND_r1.4_Page_2.jpg

[INDY LINK ONLY WILL GET Q19P_6]

19p_6

M01363_IndyCo-Op_r1.1_Page_1.jpg

M01363_IndyCo-Op_r1.1_Page_2.jpg

19p_7

M01366_MWLivingIns_r1.2_Page_1.jpg

M01366_MWLivingIns_r1.2_Page_2.jpg

M01366_MWLivingIns_r1.2_Page_3.jpg

M01366_MWLivingIns_r1.2_Page_4.jpg

19p_8

M01365_FamFun_Co-Op_r1.1_Page_1.jpg

M01365_FamFun_Co-Op_r1.1_Page_2.jpg

M01365_FamFun_Co-Op_r1.1_Page_3.jpg

M01365_FamFun_Co-Op_r1.1_Page_4.jpg

M01365_FamFun_Co-Op_r1.1_Page_5.jpg

19p_1 - 19p_8.

Have you seen these print ads before?

☐ I have seen print ads before

☐ I have NOT seen print ads before

OH Radio

19r_1. Lots of Racing

mms://sms7.omniproductions.net/IN05_OHR1.wma

19r_2. Air Force Museum

mms://sms7.omniproductions.net/IN05_OHR2.wma

19ra_1 - 19ra_2.

Were you able to hear the ad?

5. Yes

6. No → SKIP TO NEXT AD

19rb_1 - 19rb_2.

How many times have you heard this radio ad before?

☐ Never

☐ A few times

☐ Many times

OH TV

19t_1. Stars

mms://sms7.omniproductions.net/IN05_OHTV1-1.wmv

mms://sms7.omniproductions.net/IN05_OHTV1-1a.wmv

19t_2. Splash

mms://sms7.omniproductions.net/IN05_OHTV2-1.wmv

mms://sms7.omniproductions.net/IN05_OHTV2-1a.wmv

19t_3. Amish

mms://sms7.omniproductions.net/IN05_OHTV3-1.wmv

mms://sms7.omniproductions.net/IN05_OHTV3-1a.wmv

Please click on Dialup or Broadband to view the ad then answer the question.

19ta_1 - 19ta_3

Were you able to view the ad?

7. Yes

8. No → SKIP TO NEXT AD

19tb_1 - 19tb_3. How many times have you seen this TV ad before?

☐ Never

☐ A few times

☐ Many times

20. Please indicate how much these Ohio ads...

	Strongly Agree				Strongly Disagree
makes you more interested in traveling within the state.	5	4	3	2	1
leaves you wondering about location & wanting more info.	5	4	3	2	1
makes you interested in visiting the state's website.	5	4	3	2	1
makes the state seem fun and exciting.	5	4	3	2	1
makes it appear scenic and beautiful.	5	4	3	2	1
shows something unique and remarkable about the state.	5	4	3	2	1
portrays it as a place full of unexpected discoveries.	5	4	3	2	1

21. Since January, please indicate the types of information you saw or received about the following states, if any.

	Saw an article or story	Saw an ad in a magazine or newspaper	Received e-mail promotion
Michigan			
Kentucky			
Indiana			
Ohio			
Illinois			

The following questions are for classification purposes only, and will help us understand different groups of people.

23. What is your marital status?

☐ Married

☐ Divorced

☐ Widowed

☐ Single/Never married

☐ Prefer not to answer

24. Including yourself, how many people currently live in your household? _____
25. **If Q21 IS GREATER THAN 1:** How many living in your household are children under the age of 18? _____
26. Which of the following categories best represents the last grade of school you completed?
- ☐ High school or less
 - ☐ Some College/Technical school
 - ☐ College graduate
 - ☐ Post graduate degree
 - ☐ Prefer not to answer
27. Which of the following categories best represents the total annual income for your household before taxes?
- ☐ Less than \$12,500
 - ☐ \$12,500 but less than \$20,000
 - ☐ \$20,000 but less than \$30,000
 - ☐ \$30,000 but less than \$50,000
 - ☐ \$50,000 but less than \$70,000
 - ☐ \$70,000 but less than \$100,000
 - ☐ \$100,000 or more
 - ☐ Prefer not to answer
28. What is your age? _____
29. Are you ☐ Male ☐ Female
30. What is your zip code? _____

Sample Type:
DMAs –

1	Cincinnati	150
2	Dayton	150
3	Champaign	100
4	Peoria	100
5	Chicago	100
6	Indianapolis	100
7	Rest of Indiana	100
	Total	800

Tested Ads

Print



INTour_AAACincy03-04_05.jpg



INTour_MWLiv03-04_05.jpg

Radio

blue_spring.mp3
dunes.mp3
Indiana_beach.mp3
Paramount.mp3
Turkey_run.mp3
West_baden.mp3
White_river.mp3

mms://sms7.omniproductions.net/INR04_1.wma
mms://sms7.omniproductions.net/INR04_2.wma
mms://sms7.omniproductions.net/INR04_3.wma
mms://sms7.omniproductions.net/INR04_4.wma
mms://sms7.omniproductions.net/INR04_5.wma
mms://sms7.omniproductions.net/INR04_6.wma
mms://sms7.omniproductions.net/INR04_7.wma

TV

Blue Springs	mms://sms7.omniproductions.net/INT04_1-1.wmv mms://sms7.omniproductions.net/INT04_1-1a.wmv
Dunes	mms://sms7.omniproductions.net/INT04_2-1.wmv mms://sms7.omniproductions.net/INT04_2-1a.wmv
Monument circle	mms://sms7.omniproductions.net/INT04_3-1.wmv mms://sms7.omniproductions.net/INT04_3-1a.wmv
Paramount	mms://sms7.omniproductions.net/INT04_4-1.wmv mms://sms7.omniproductions.net/INT04_4-1a.wmv
Turkey Run	mms://sms7.omniproductions.net/INT04_5-1.wmv mms://sms7.omniproductions.net/INT04_5-1a.wmv
West Baden	mms://sms7.omniproductions.net/INT04_6-1.wmv mms://sms7.omniproductions.net/INT04_6-1a.wmv
Holiday World	mms://sms7.omniproductions.net/IN05_INT1-1.wmv mms://sms7.omniproductions.net/IN05_INT1-1a.wmv
Madison/ Scenic Byways	mms://sms7.omniproductions.net/IN05_INT2-1.wmv mms://sms7.omniproductions.net/IN05_INT2-1a.wmv
Notre Dame	mms://sms7.omniproductions.net/IN05_INT3-1.wmv mms://sms7.omniproductions.net/IN05_INT3-1a.wmv

Illinois

TV

Joggers

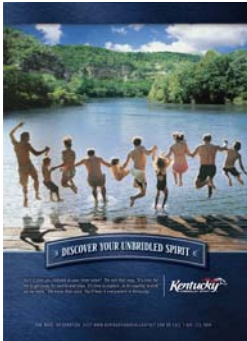
mms://sms7.omniproductions.net/MDT05_ILTV1.wmv
mms://sms7.omniproductions.net/MDT05_ILTV1a.wmv

Statues

mms://sms7.omniproductions.net/MDT05_ILTV3.wmv
mms://sms7.omniproductions.net/MDT05_ILTV3a.wmv

Kentucky

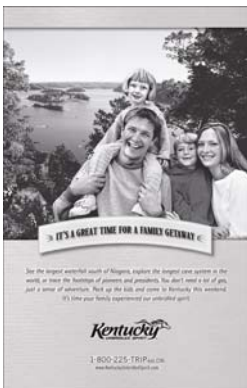
Print



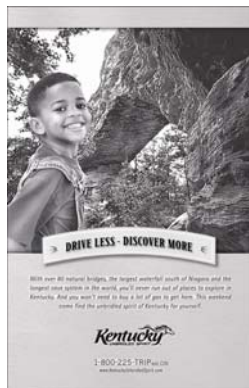
AAA_final_Page_1.jpg



AAA_final_Page_2.jpg



Tourism Reg Ad 1.jpg



Tourism Reg Ad 2.jpg



Tourism Reg Ad 3.jpg

TV

Everybody Knows

mms://sms7.omniproductions.net/IN05_KYTV1-1.wmv
mms://sms7.omniproductions.net/IN05_KYTV1-1a.wmv

Michigan

TV

Beachball/Splashing

mms://sms7.omniproductions.net/MDT05_MITV1.wmv

mms://sms7.omniproductions.net/MDT05_MITV1a.wmv

Sign/City/Bike

mms://sms7.omniproductions.net/MDT05_MITV2.wmv

mms://sms7.omniproductions.net/MDT05_MITV2a.wmv

Ohio

Print



D06639_FF_insert_lo3_Page_1.jpg



D06639_FF_insert_lo3_Page_2.jpg



D06640_ML_insert_lo3_Page_1.jpg



D06640_ML_insert_lo3_Page_2.jpg



D06645_RS_insert_lo1_Page_1.jpg



D06645_RS_insert_lo1_Page_2.jpg



M01357_AAA_3_IND_r1.4_Page_1.jpg



M01357_AAA_3_IND_r1.4_Page_2.jpg



M01362_ChicagoCo-Op_r1.1_Page_1.jpg



M01362_ChicagoCo-Op_r1.1_Page_2.jpg



M01363_IndyCo-Op_r1.1_Page_1.jpg



M01363_IndyCo-Op_r1.1_Page_2.jpg



M01366_MWLivingIns_r1.2_Page_1.jpg



M01366_MWLivingIns_r1.2_Page_2.jpg



M01366_MWLivingIns_r1.2_Page_3.jpg



M01366_MWLivingIns_r1.2_Page_4.jpg



M01365_FamFun_Co-Op_r1.1_Page_1.jpg



M01365_FamFun_Co-Op_r1.1_Page_2.jpg



M01365_FamFun_Co-Op_r1.1_Page_3.jpg
Op_r1.1_Page_4.jpg



M01365_FamFun_Co-



M01365_FamFun_Co-Op_r1.1_Page_5.jpg

Radio

Lots of Racing

mms://sms7.omniproductions.net/IN05_OHR1.wma

Air Force Museum

mms://sms7.omniproductions.net/IN05_OHR2.wma

TV

Stars

mms://sms7.omniproductions.net/IN05_OHTV1-1.wmv

mms://sms7.omniproductions.net/IN05_OHTV1-1a.wmv

Splash

mms://sms7.omniproductions.net/IN05_OHTV2-1.wmv

mms://sms7.omniproductions.net/IN05_OHTV2-1a.wmv

Amish

mms://sms7.omniproductions.net/IN05_OHTV3-1.wmv

mms://sms7.omniproductions.net/IN05_OHTV3-1a.wmv